Desktop Services Guidebook for Adobe Acrobat

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Tutorials from Adobe: Click the link below to visit Adobe's web site
Adobe's Acrobat Tutorial Web Site

# Introduction to Adobe Acrobat

What is Acrobat?

Adobe Acrobat is used to read and create **Portable Document Format** (**PDF**) files. A limited version of the program, **Acrobat Reader**, is installed on most state workstations as standard software. An employee using Acrobat Reader can read and print any document created in Acrobat, but cannot change the document. Only a user who has the full version of Acrobat installed on their workstation can create or modify PDF files. (Other variations of the product exist, but these are the only two currently used in the state environment.)

Converting Word Files to PDF

If a user has both Acrobat and Microsoft Word installed on their workstation, it is possible to create a PDF file directly from the Word document. To convert an existing Microsoft Word file to PDF format, follow the procedure below:

1. **Open** the document in Word;
2. Click the **File** menu and select **Print...**
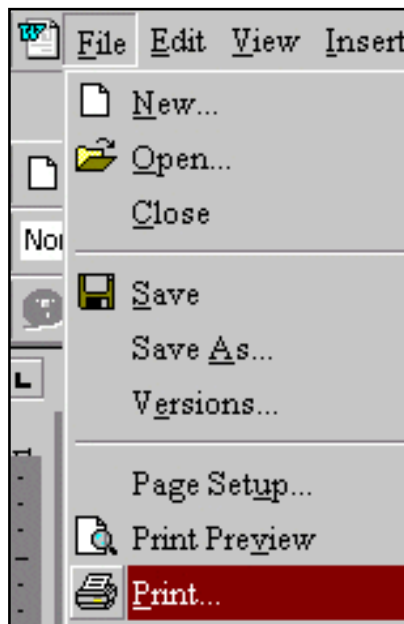
3. Using the drop-down box for the **Printer Name**, select **Acrobat PDFWriter**;
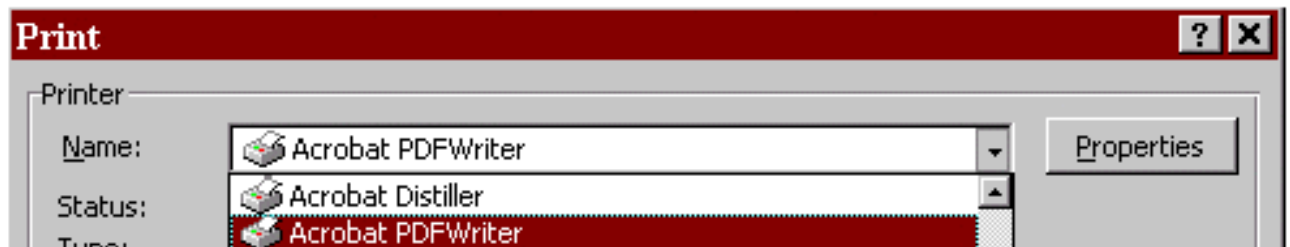
4. Click the **Properties** button;
5. In the **Acrobat PDFWriter Properties** window, make sure you are on the **Page Setup** tab, as shown below:
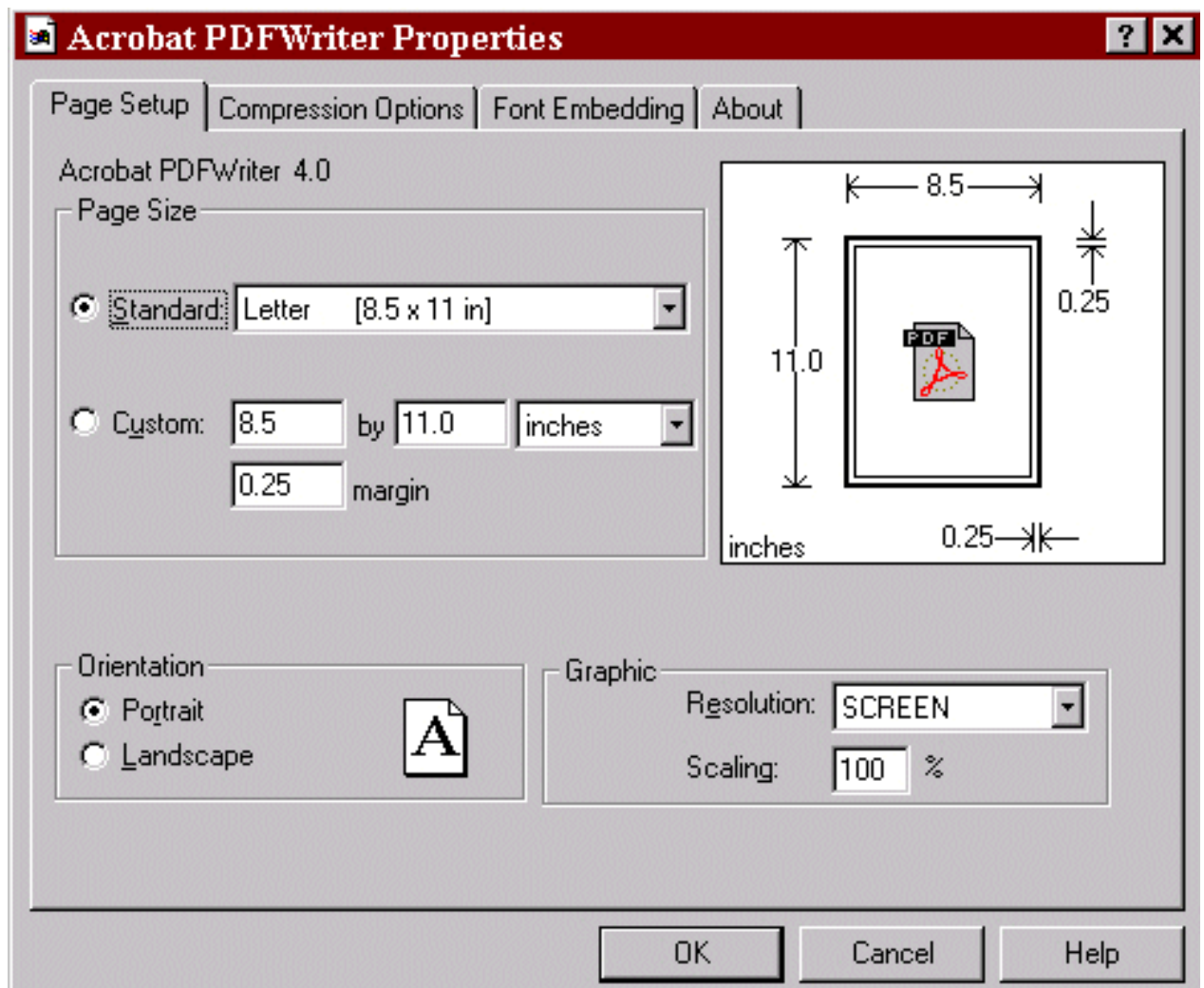
   a. Set the Resolution to **SCREEN**;
   b. Set the Scaling to **100%**;
   c. Set the margin to **.25**;
   d. Click **OK** to close the Properties window

6. Click **OK** to close the Print window
7. You will see a **Save PDF File As** window. In it:

a. Place a check mark in the **View PDF File** option box; (this will allow you to see the new file immediately)
b. Navigate to the directory where you want to save, and enter a **file name**;
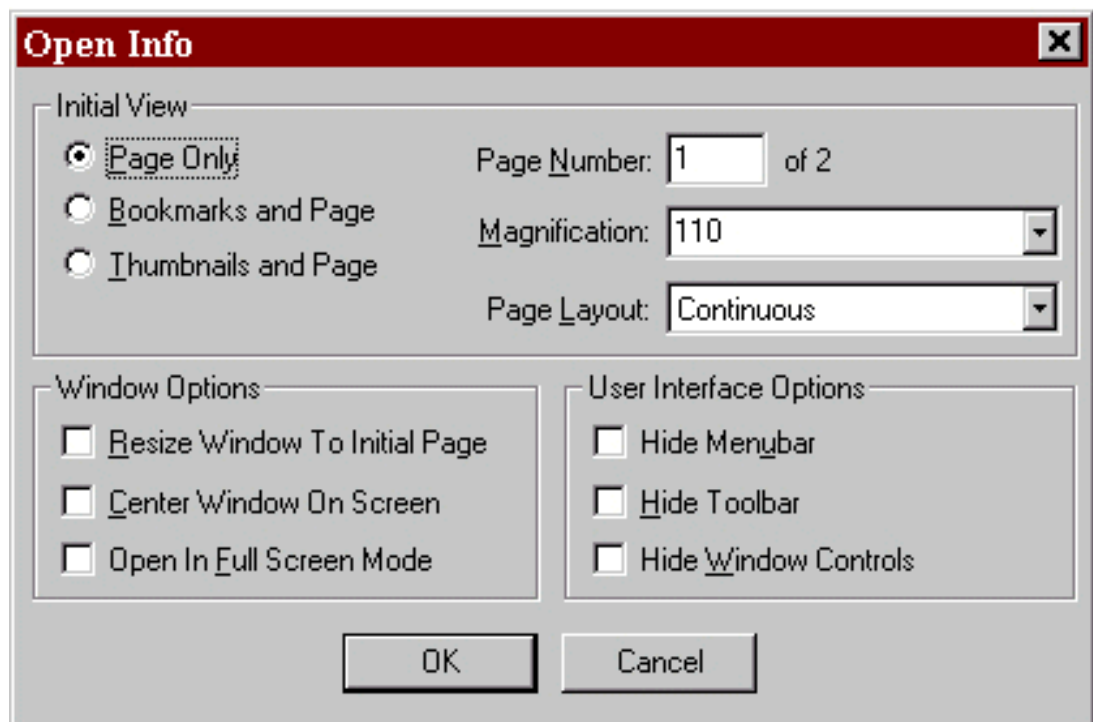c. Click the **Save** button to save the file. Acrobat will open automatically so you can complete your work.

8. In Acrobat:

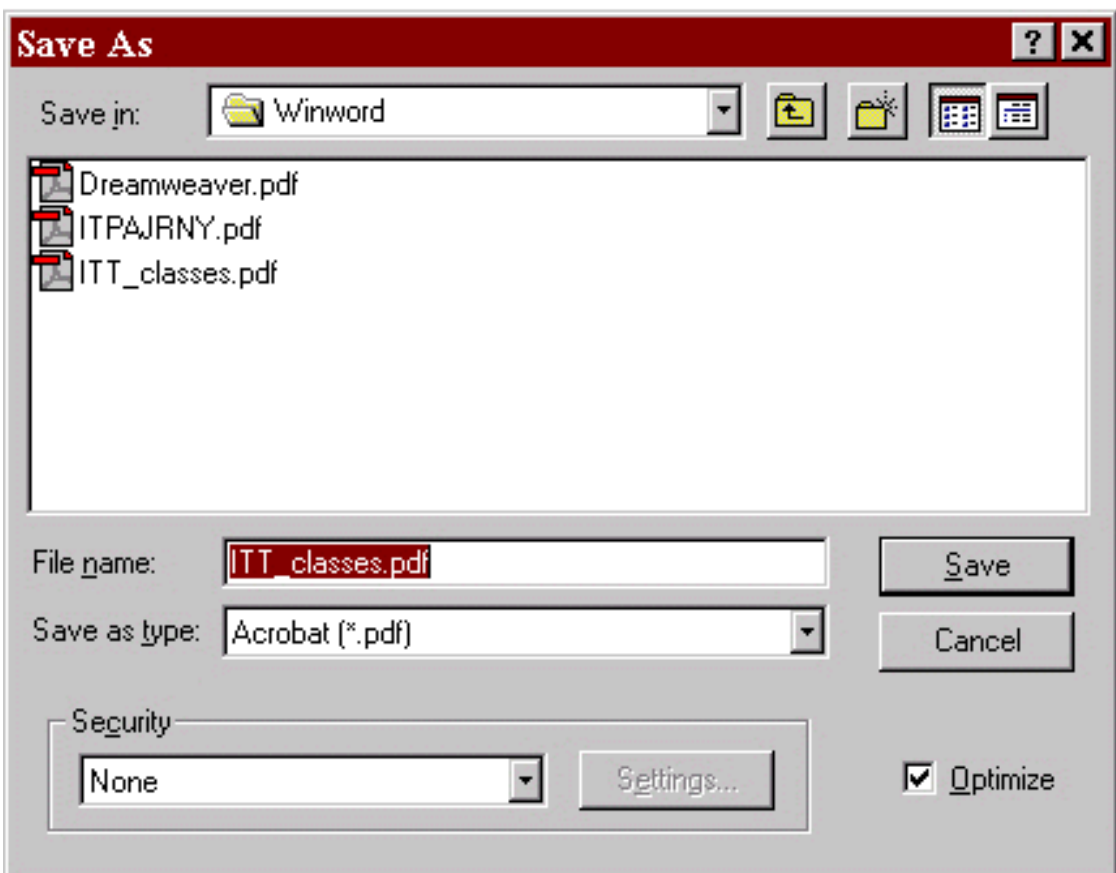a. Open the **File** menu, and select **Document Info | Open**;

(This takes you to settings that affect how the document will be displayed when it opens for the user in Acrobat Reader.)

Open Info

Initial View
- ⦿ Page Only
- ◯ Bookmarks and Page
- ◯ Thumbnails and Page

Page Number: 1   of 2

Magnification: 110

Page Layout: Continuous

Window Options
- ☐ Resize Window To Initial Page
- ☐ Center Window On Screen
- ☐ Open In Full Screen Mode

User Interface Options
- ☐ Hide Menubar
- ☐ Hide Toolbar
- ☐ Hide Window Controls

[OK]   [Cancel]

b. If the document is to be displayed in **Portrait** orientation, set the **Magnification to 110**; if the document is to be displayed in **Landscape** orientation, set the **Magnification to 100**

Note: 110 is **not** an option in the drop down settings. You will have to **type 110** in the Magnification box.

c. Set the **Page Layout** to **Continuous**
d. Click **OK** to close the Open Info window
e. Use **File | Save As...** to save the file again. Make sure that the **Optimize** option is checked before clicking the Save button.

Save As

Save in: Winword

Dreamweaver.pdf
ITPAJRNY.pdf
ITT_classes.pdf

File name: ITT_classes.pdf

Save as type: Acrobat (*.pdf)

Security

None

Settings...

Save

Cancel

☑ Optimize

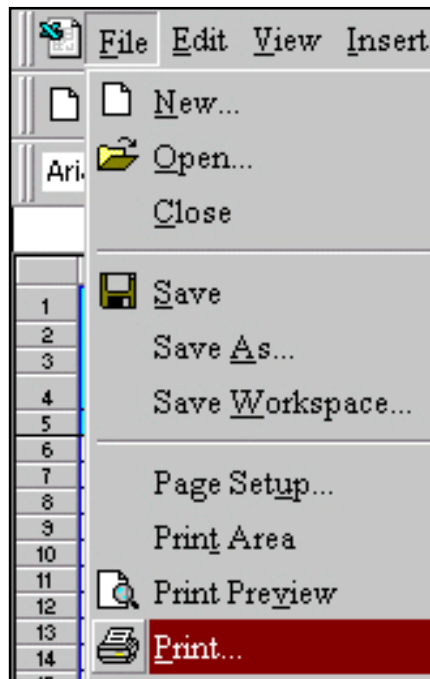# Converting an Excel Spreadsheet with PDFWriter

Why is Excel Different?

Most spreadsheets are meant to be displayed in Landscape orientation, which makes them different from most Word documents. Also, most spreadsheets do not have obvious page breaks built into them, which means you may need to set this before you print. Finally, there are two methods for converting a spreadsheet: which one you use depends on whether your spreadsheet contains bar graphs with patterned fill lines.

Converting Excel Files to PDF

If a user has both Acrobat and Microsoft Excel installed on their workstation, it is possible to create a PDF file directly from an Excel spreadsheet. To convert an existing spreadsheet to PDF format, follow the procedure below:

1. **Open** the document in Excel;
2. Click the **View** menu and select **Page Break Preview**. You will see a scrollable view of your spreadsheet with **blue lines** where page breaks will occur. You may drag the blue lines to make page breaks occur in more meaningful places. Caution: do not try to make the pages longer than a standard printer can handle. When you are done adjusting page breaks, continue with the next step.
3. Click the **File** menu and select **Print...**

4. You must now make a choice. Using the drop-down box for the **Printer Name**, you will select either **Acrobat PDFWriter** or **Acrobat Distiller**. Here is the rule for making your choice:

   ○ If your spreadsheet includes **column or bar graphs with patterned fill lines**, you should select **Acrobat Distiller**. Do so and click this link for the rest of the instructions. (An example of patterned fill lines is shown below.)
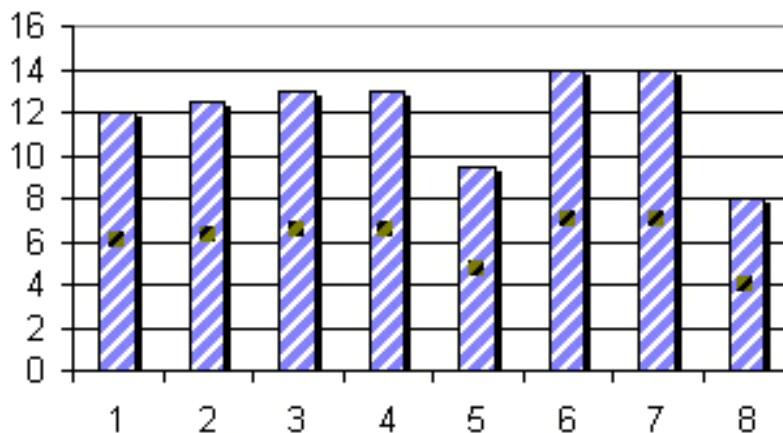
   ○ If your spreadsheet does **not** include **column or bar graphs with patterned fill lines**, you should select **Acrobat PDFWriter**. Do so and continue with the instructions on this page.

5. Click the **Properties** button;

6. If you chose Acrobat Distiller in Step 4, you are on the wrong page. The right page is <u>here</u>.
   If you chose Acrobat PDFWriter, continue.

PDFWriter Instructions:
If you chose to print to Acrobat PDFWriter, you will see the **Acrobat PDFWriter Properties** window. Make sure you are on the **Page Setup** tab, as shown below:

Acrobat PDFWriter Properties

Page Setup | Compression Options | Font Embedding | About

Acrobat PDFWriter 4.0

Page Size

- ⦿ Standard: Letter [8.5 x 11 in]
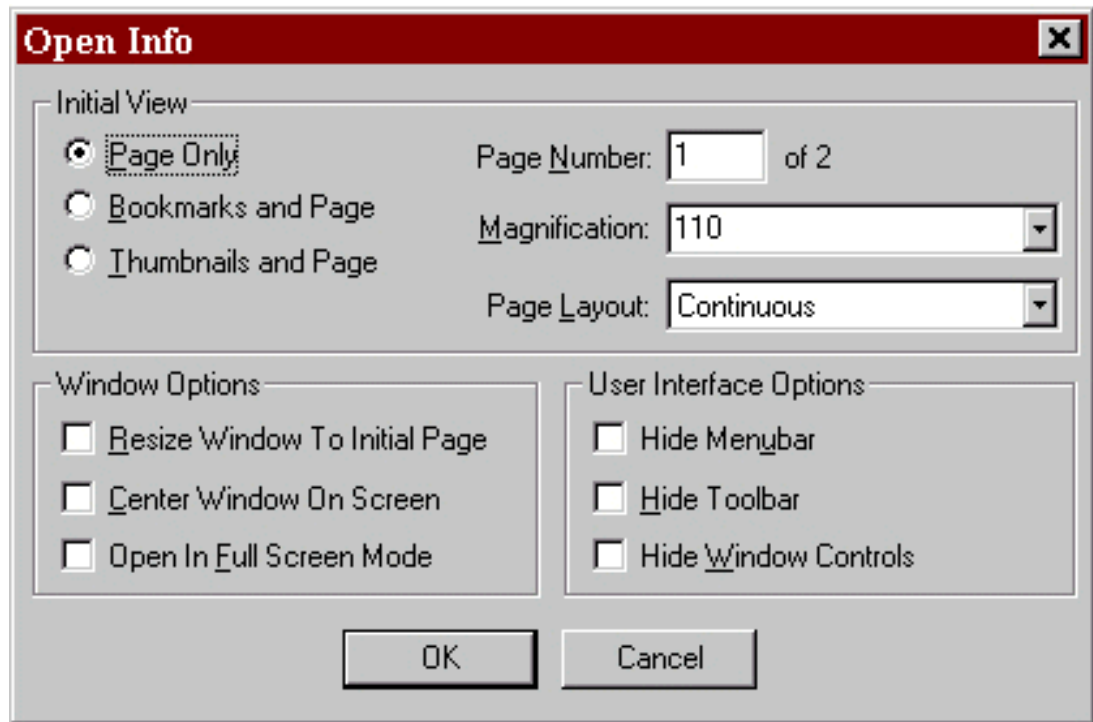- ○ Custom: 8.5 by 11.0 inches
  - 0.25 margin

8.5
11.0
0.25
0.25
inches

Orientation
- ⦿ Portrait
- ○ Landscape

A

Graphic
- Resolution: SCREEN
- Scaling: 100 %

[OK] [Cancel] [Help]
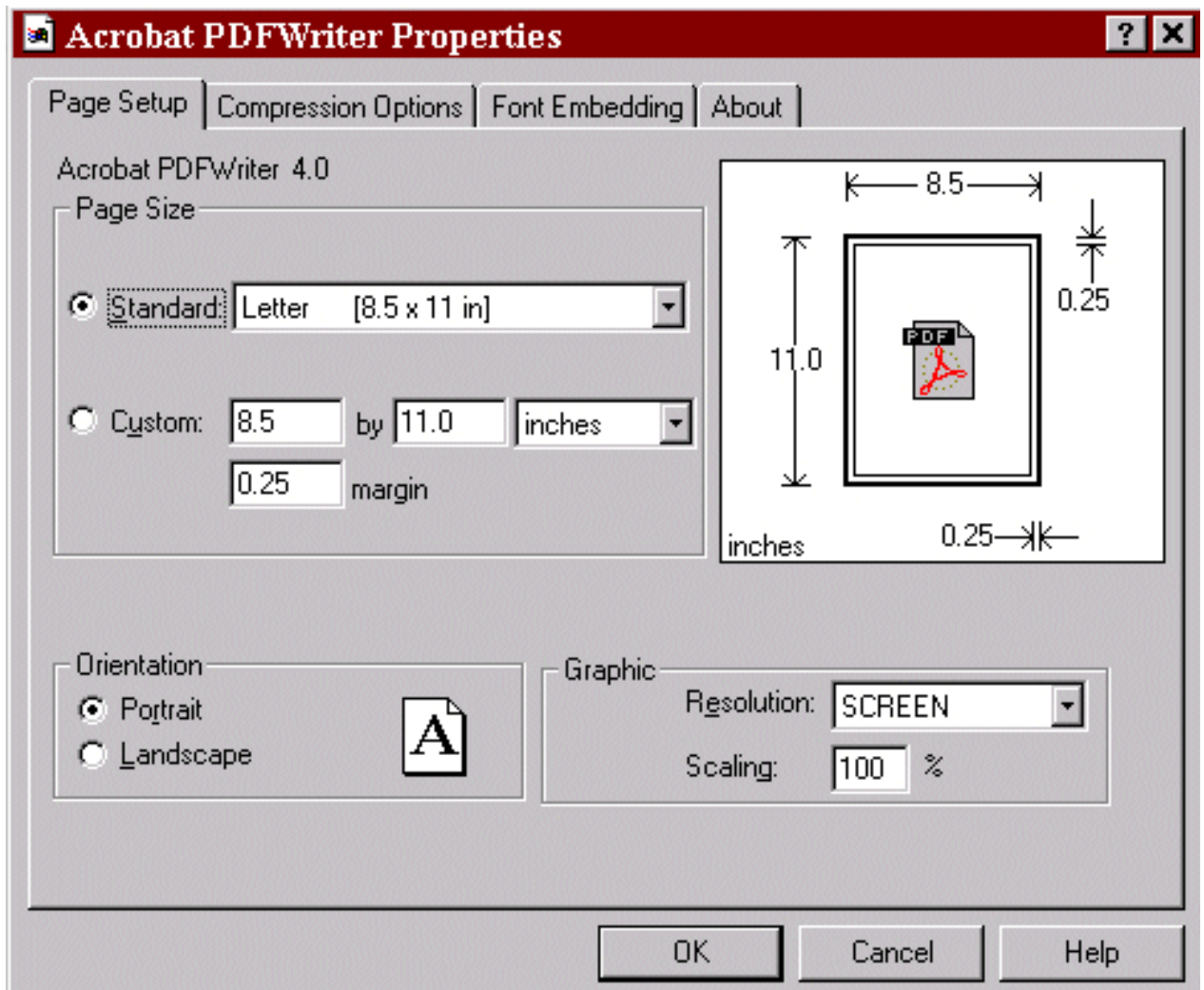
a. Set the Resolution to **SCREEN**;
b. Set the Scaling to **100%**;
c. Set the margin to **.25**;
d. Click **OK** to close the Properties window, and continue with Step 7.

Note: At this point, Excel offers a Preview button in the Print window. It may be useful to click it, then click the Margins tab on the next screen. From here you can drag your margins to adjust spacing. This option is not available in Word.

7. Click **OK** to close the Print window.

8. If you are printing to **Acrobat PDFWriter**, you will will see a **Save PDF File As** window. In it:
   a. Place a check mark in the **View PDF File** option box; (this will allow you to see the new file immediately)
   b. Navigate to the directory where you want to save, and enter a **file name**;

c. Click the **Save** button to save the file. Acrobat will open automatically so you can complete your work.

9. In Acrobat:
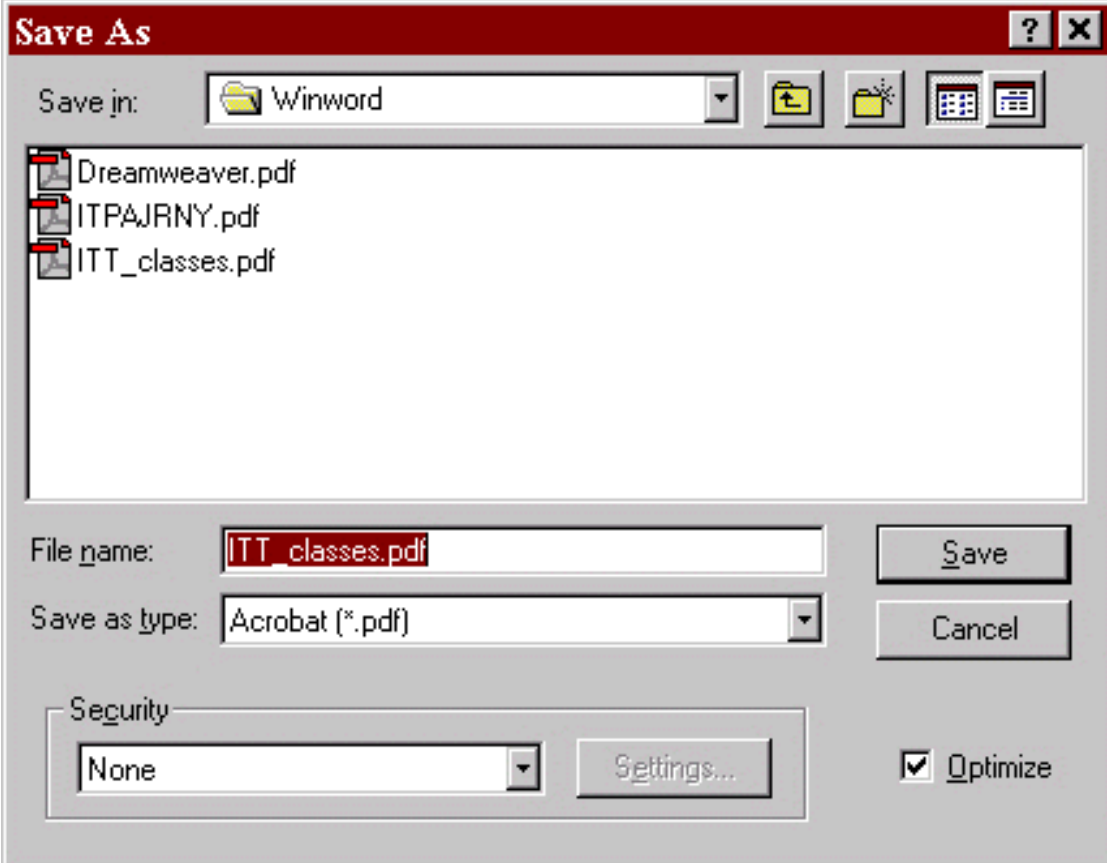   a. Open the **File** menu, and select **Document Info | Open**;

   (This takes you to settings that affect how the document will be displayed when it opens for the user in Acrobat Reader.)

   b. If the document is to be displayed in **Portrait** orientation, set the **Magnification to 110**; if the document is to be displayed in **Landscape** orientation, set the **Magnification to 100**

   Note: 110 is **not** an option in the drop down settings. You will have to **type 110** in the Magnification box.

   c. Set the **Page Layout** to **Continuous**
   d. Click **OK** to close the Open Info window
   e. Use **File | Save As...** to save the file again. Make sure that the **Optimize** option is checked before clicking the Save button.

Save As

Save in: Winword

- Dreamweaver.pdf
- ITPAJRNY.pdf
- ITT_classes.pdf

File name: ITT_classes.pdf

Save as type: Acrobat (*.pdf)

Security

None

Settings...

Save

Cancel

☑ Optimize

Modifying Text in Acrobat

Can I edit a PDF file?

Files stored in the PDF format can be edited in Adobe Acrobat. A method for doing so is explained below.

This method is best used for **correction of small errors**, since it only allows you to edit **one line at a time**.

Should I edit a PDF file?

Adobe recommends that **extensive editing** be done in the **source** documents, using the applications that created them: Word, Excel, etc. The edited documents may then be used to generate PDF files again. This method is preferred in order to preserve word wrapping and page numbering. If you have only changed a few pages, you may choose to regenerate only the corrected pages and insert these corrected PDF pages into the document that needs to be corrected. (This is discussed in this guide under Other Options.) Editing in the original documents and regenerating PDF files will also enable you to keep your documents looking the same, and will create less maintenance work for you.

Editing in Acrobat

Extensive information about using this method is available in the Help Section of Adobe Acrobat. Below are basic instructions:

1. Run Adobe Acrobat, and **open** the document you wish to edit.
2. Select the **TouchUp Text Tool** from the vertical button bar on the **left** side of the screen. (This is the button with the **white T**, not the black T.)
3. Click on the portion of the document you wish to edit. A rectangle shaped **selection box** will appear around the entire line of text you have clicked. An **insertion cursor** will appear at the point where you clicked. (In the example below, the insertion cursor is to the left of the word "will".)
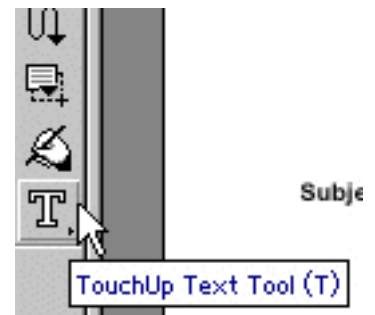
> Computing division of DIT will be offering several classes starting in March. These classes will be to provide training needed for current duties, as well as training for their new role as Software trainer. The Technical Training Team

- ○ You may **highlight** text and **type over** it, to make replacement easier.
- ○ You may **insert** or **delete** text.
- ○ If you do either of the above, be aware that there is **no word wrap** feature to clean up margins.
- ○ You may **move** the selected line **horizontally**, by dragging one of the **diamond shaped handles** at the left side of the selection box.
- ○ You may **undo** your last change by pressing **Ctrl-Z** (or by using the Edit menu).

How do I change the color of text?

1. **Highlight** the text;
2. Click the **Tools** menu, and select **Touchup | Text Attributes...** ;
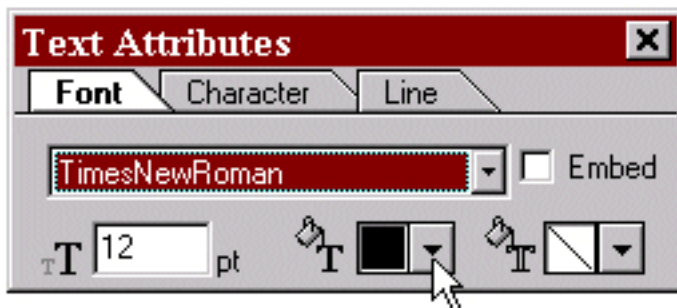
3. Make sure the **Font** tab is selected, as in the example above.
4. Click the **down arrow** in the middle of the bottom row
5. **Select** a predefined color by name, or select **Other** to see more colors

How do I change a font?

1. **Highlight** the text;
2. Click the **Tools** menu, and select **Touchup | Text Attributes...** ;

Text Attributes

Font | Character | Line

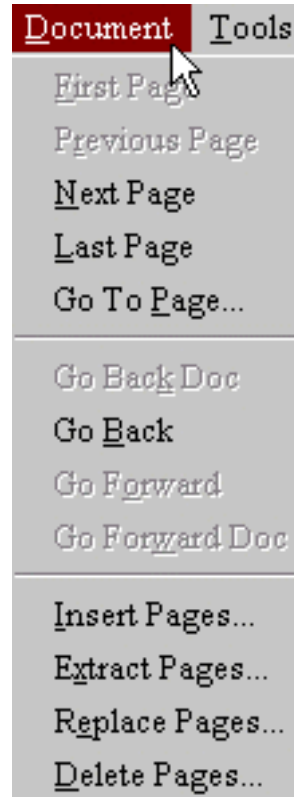TimesNewRoman ▾ ☐ Embed

₸T 12 pt ᴬT ■ ▾ ᴬT ◹ ▾
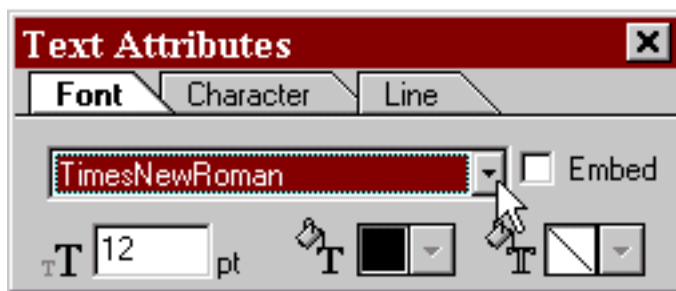
3. Make sure the **Font** tab is selected, as in the example above.
4. Click the **down arrow** next to the name of the font currently in use
5. **Select** a font from the drop down list
6. Do **not** embed the font unless necessary. See the note below.

Note: Adobe does **not** recommend embedding fonts in your PDF files. Embedding fonts ensures that readers will see the fonts that are actually used in your documents, but it also adds to the **size** and **load time** of the PDF file. By default, if fonts are not embedded in a document, Acrobat Reader will substitute other fonts for any document font that the user does not have. If the user already has the fonts used in your document, embedding is not necessary. Try to use standard state fonts to avoid this issue.

Examples of current standard fonts:	
• Arial	• Bookman Old Style
• **Comic Sans MS**	• Garamond
• **Impact**	• **Georgia**
• Modern	• MS Serif
• MS Sans Serif	• Times New Roman
• **Tahoma**	
• Trebuchet MS	
• **Verdana**	

Other Options in Adobe Acrobat

All options below use the **Document menu**, shown on the right:

Document	Tools
First Page	
Previous Page	
Next Page	
Last Page	
Go To Page...	
Go Back Doc	
Go Back	
Go Forward	
Go Forward Doc	
Insert Pages...	
Extract Pages...	
Replace Pages...	
Delete Pages...	

Adding Pages from Another Document

To add all pages of another document to the current Acrobat document:

1. **Open** the document in which you will insert pages.
2. Click the **Document** menu, and select **Insert Pages...**
3. You will see a **Select File to Insert** navigation box. Navigate to the file you wish to insert, select it, and click the **Open** button.
4. An **Insert** window will appear:
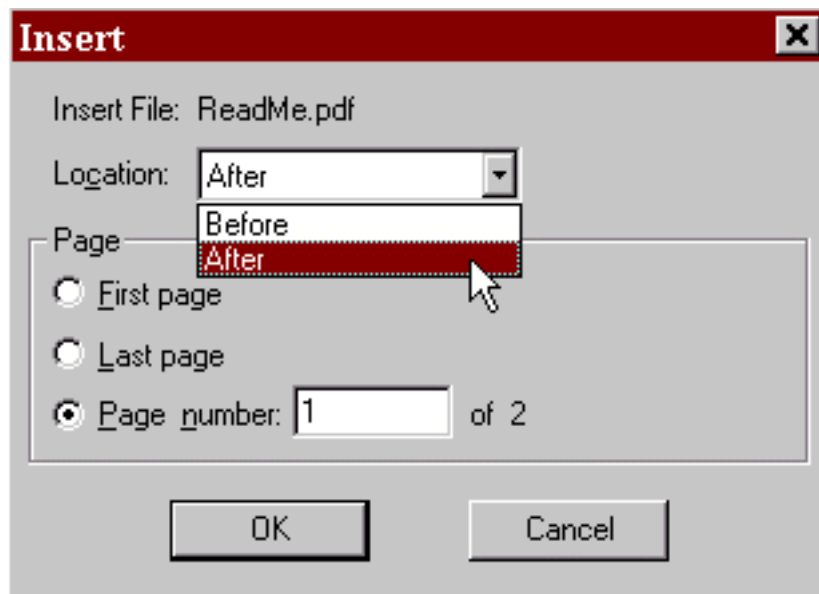
Use the options on this window to insert the new material:
- ❍ **Before** or **After** the **first** page of your current document
- ❍ **Before** or **After** the **last** page of your current document
- ❍ **Before** or **After** a **specific** page of your current document

Please note that these are your only options. You **cannot**click in the document to place an insertion point.

Cutting or Copying Pages

This procedure takes advantage of the fact that Acrobat can have multiple documents open at once, like most Windows applications.

To **cut** (remove) pages from the current Acrobat document:

1. **Open** the document you want to cut pages from.
2. Click the **Document** menu, and select **Extract Pages...**
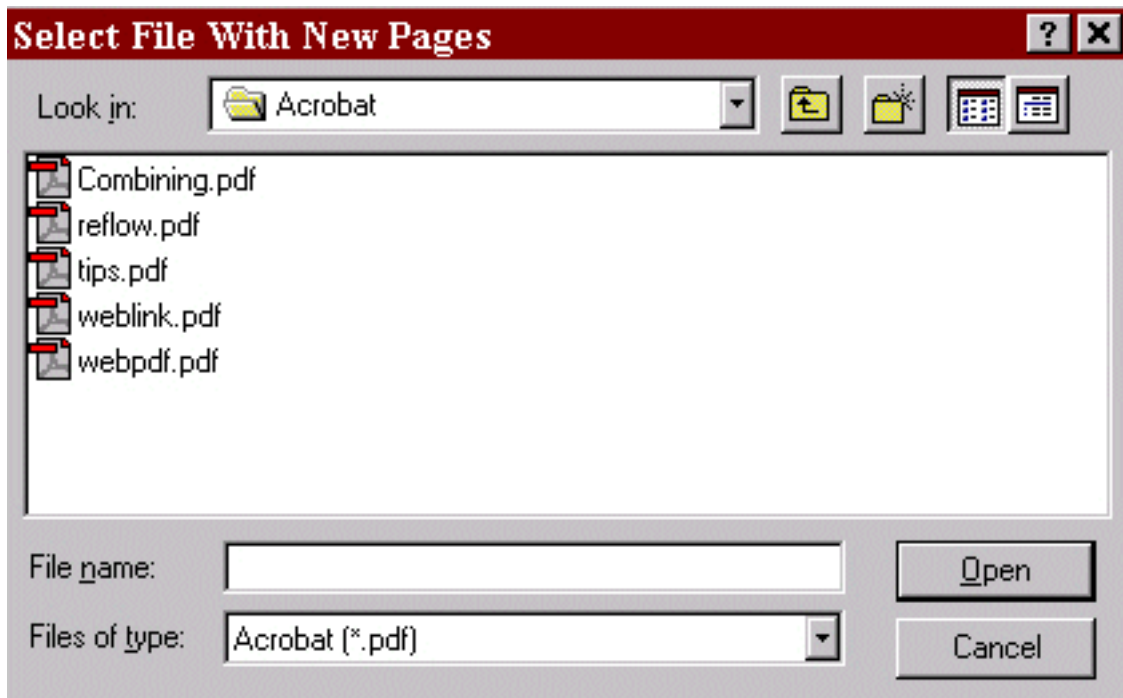3. An **Extract Pages** window will appear, as shown below:

Extract Pages

From: `1`   To: `1`   of 628

☐ Delete Pages After Extracting

[OK]   [Cancel]
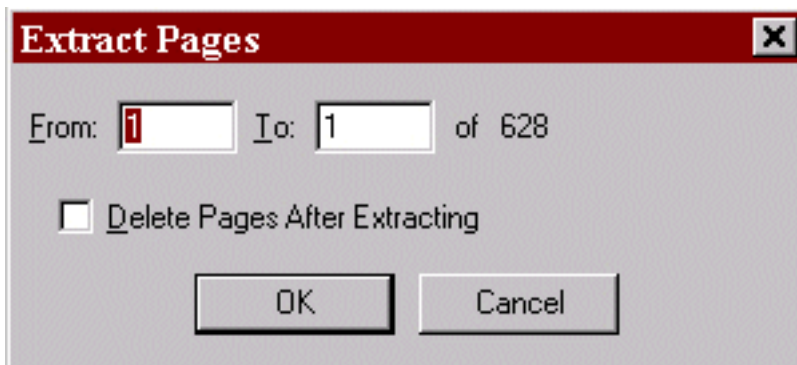
4. Enter the page numbers of a **range** of pages to extract in the **From** and **To** boxes. In the example above, the document has 628 pages:
   - ○ If you wanted to extract **only the first one**, you would enter 1 in both the **From** and the **To** boxes, as shown.
   - ○ If you wanted **pages 21 through 35**, you would enter 21 in the **From** box and 35 in the **To** box.
5. Place a **check mark** in the box next to "**Delete Pages After Extracting**", if you want the pages removed from the original document.
6. A **new** PDF document will be created, and the pages you have extracted will be **pasted** into it. This new document becomes the **active** document. If you do not want to keep it, just close it without saving it. You may **switch** to your original document by opening the Window menu and clicking the document's name in the bottom section of the menu.
7. **Save** your original document to preserve your changes (or save with a new name, if desired).

To **copy** pages from one document to another, follow **Steps 1 through 4** above, but do **not** check the box in **Step 5**. If you need to insert these pages into another document, save the new file in Step 5, then follow the procedure for Adding Pages above.

Replacing Pages

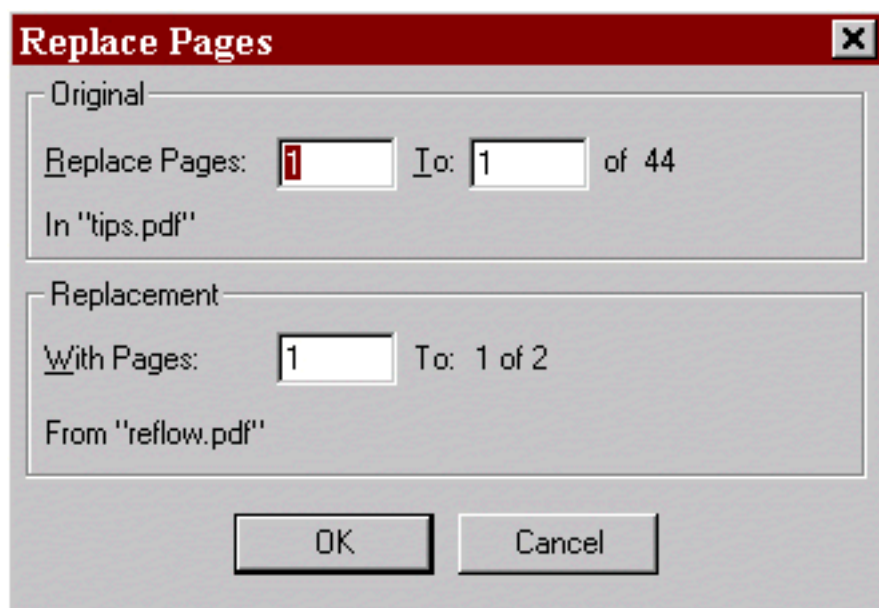It is possible to replace a range of pages in an existing Acrobat document with a range of pages from another Acrobat document. To do so:

1. **Open** the document you want to change.
2. Click the **Document** menu, and select **Replace Pages...**
3. A **Select File With New Pages** window will open. Navigate to the file you will pull new pages from, **select** it, and click the **Open** button.

Select File With New Pages

Look in: Acrobat

- Combining.pdf
- reflow.pdf
- tips.pdf
- weblink.pdf
- webpdf.pdf

File name: [   ] Open

Files of type: Acrobat (*.pdf) Cancel

4. A **Replace Pages** window will open, shown below.

Replace Pages

Original

Replace Pages: [1]   To: [1]   of 44

In "tips.pdf"

Replacement

With Pages: [1]   To: 1 of 2

From "reflow.pdf"

OK   Cancel

5. In the top two boxes, specify the **range** of pages you wish to be **replace** in the open (Original) document. It is a good idea to make sure that you have opened the correct document before going farther. Read the file names on the screen carefully. In this example, we have opened tips.pdf (Original) and are replacing page 1 with page 1 of reflow.pdf (Replacement).

6. Specify the **range** of pages to use from the Replacement document. Note that you can only specify the **starting** page number.

o Acrobat will assume **similar** ranges.
o For example, assume you choose to replace pages 10 through 29 (20 pages) in the **Original** document. You tell Acrobat to start with page 40 in the **Replacement** document. Acrobat will assume that you want to use pages 40 through 59 from the Replacement document (20 pages). If there are insufficient pages in the Replacement document, Acrobat will start with the page you specify and use all the rest.

7. Click **OK** to complete the replacement.
8. **Save** your changed document.

Special note: If you replace pages, any existing **hypertext links** that were on the **original** pages are **still in the document**. This is because Acrobat stores hyperlinks in a layer above the document, not as part of the document itself. You will have to adjust the links **manually** in the replaced pages, using the Editing Hyperlinks procedure elsewhere in this guide.

Deleting Pages

It is also possible to delete pages from an Acrobat document. Follow this procedure:

1. **Open** the document you want to change.
2. Click the **Document** menu, and select **Delete Pages...**
3. A **Delete Pages** window will open. Specify the range of pages you wish to delete, and click the **OK** button.
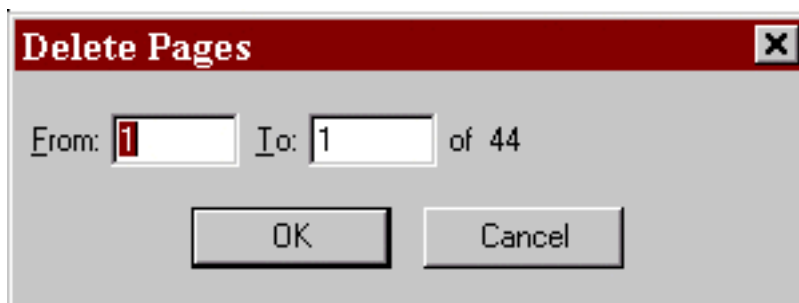
Adding Hyperlinks in Adobe Acrobat

Adding Hyperlinks

A **hyperlink**, or **hypertext link**, is a word or phrase in your document which will **jump the reader to another position in your document** when the reader clicks it. Most readers are familiar with such links from using the World Wide Web.

If you are familiar with web page construction, you should be aware that Acrobat adds links in an **different** way. Imagine taking a clear sheet of plastic, placing it over the actual document page you are working on, and constructing your hypertext link on the new **layer**. This complicates the idea of changing a page that has links, as we discuss below. (See Editing Hyperlinks.)

To **create** such a link in an Acrobat PDF file, follow the procedure below:

1. Run **Adobe Acrobat**. Open the document you want to put hyperlinks in.
2. Choose the word or phrase that will serve as your hyperlink. Change the color of that text to blue, using the Changing Colors procedure, found elsewhere in this guide. (This is a convention. Most web pages present links as blue text, so this will make it look familiar to your reader.)
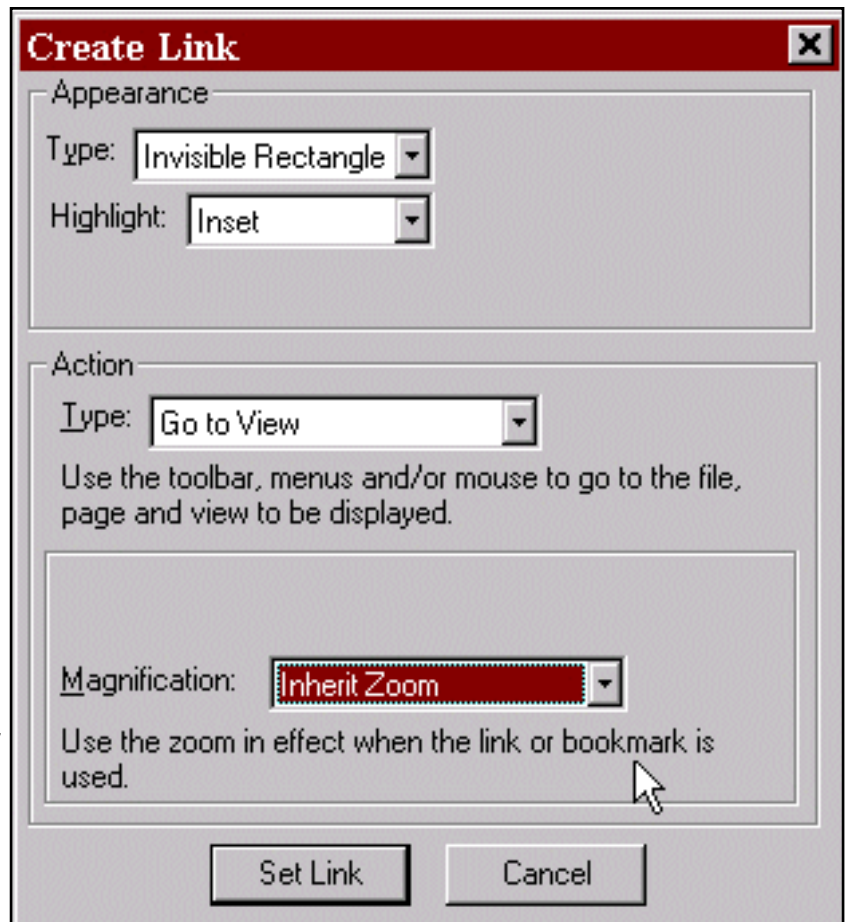3. Click the **Link Tool** icon on the vertical tool bar.
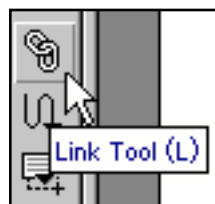
Link Tool   **Hotspot example**

4. Click and **drag** a rectangle around the blue text. This is called creating a Hotspot. The edges of the rectangle may cover other words, if you wish. (If you have made a **mistake**, you can drag the corners of the rectangle to resize it, or just click the Cancel button on the next screen, then try again.)

   When you release the mouse button, the **Create Link** window will appear.

5. In the **Appearance** section:
   ○ set **Type** to **Invisible Rectangle**
   ○ set **Highlight** to **Inset**

6. In the **Action** section:
   ○ Set **Type** to **Go To View**.

7. In the **Magnification** section:
   ○ Select **Inherit Zoom**. (If the user has changed the zoom settings, this will keep what the user has selected.)

Create Link ☒

Appearance

Type: Invisible Rectangle ▾

Highlight: Inset ▾

Action

Type: Go to View ▾

Use the toolbar, menus and/or mouse to go to the file, page and view to be displayed.

Magnification: Inherit Zoom ▾

Use the zoom in effect when the link or bookmark is used.

[Set Link]   [Cancel]

8. Move to the spot in the document where you want the link to go. You may use the **scroll bar, page keys, arrow keys**, etc. Make sure you are looking at the part of the document that you want the reader to see when they click on the hyperlink.

9. Click on the **Set Link** button. The hyperlink is now enabled.

   If you try to set a link too close to the bottom of a page, the link will jump to the next page when clicked.

10. To test the hyperlink, select the **Hand Tool** from the vertical tool bar.

   Hand Tool   **Open Hand**   **Index Finger**

11. The Hand Tool causes the **mouse pointer** to look like an **open hand** as you pass over ordinary text with the mouse. Pass the mouse pointer over your hyperlink, and the pointer should change to a **pointing index finger**. This proves you have a hyperlink.
12. **Click** the hyperlink text. It should change the view of the document to the one you had when you clicked the Set Link button in Step 8.
13. If everything is the way you want it, **save** your document. If not, close the document without saving, and start over, or use the Editing Hyperlinks procedure below. Nothing in either of these procedures is permanent until the document is saved.

Editing Hyperlinks

You may need to **edit** hyperlinks in your document, especially if you have edited the document or replaced pages in it. When you replace or edit a page, any links from the original page are retained because links are stored in a **layer** above the page. It is unlikely that the link will still be over an appropriate position in the document, which leads to editing the link itself.

To **edit** a hyperlink:

1. If you have not done so already, run **Adobe Acrobat**, and open the document to edit.
2. Select the **Link Tool**.

3. The links on the current page will be **visible** while the Link Tool is selected.
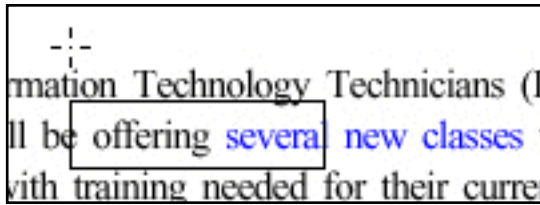
Inspect them for proper position. To **reposition** the link rectangle:
- a. **Left-click** the link rectangle. **Handles** will become visible at each corner.
- b. Place your mouse pointer over a **handle** on one corner of the rectangle. The mouse pointer icon will become a **diagonal double-headed** arrow.
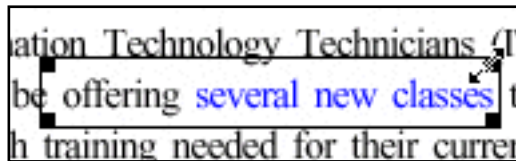
- c. **Drag** the corner where you want it to be.
- d. **Repeat** with other corners as necessary.

4. To edit the **properties** of a link:
- a. **Right-click** the link rectangle.
- b. A context-sensitive menu will appear. Select **Properties...**
- c. From the Properties screen you can change the **Appearance**, **Action**, and **Destination** settings.

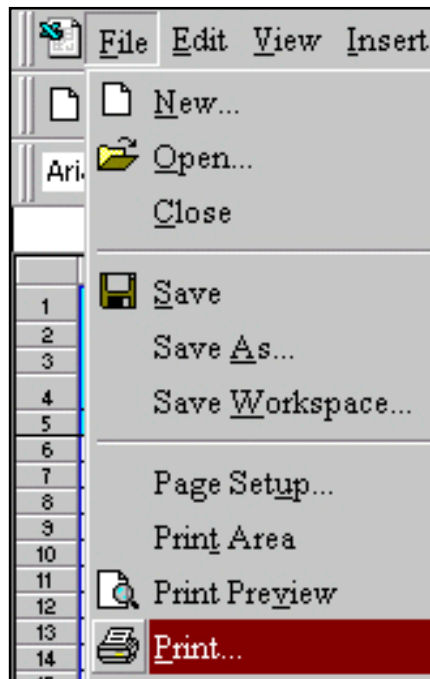# Converting an Excel Spreadsheet with Distiller

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Most spreadsheets are meant to be displayed in Landscape orientation, which makes them different from most Word documents. Also, most spreadsheets do not have obvious page breaks built into them, which means you may need to set this before you print. Finally, there are two methods for converting a spreadsheet: which one you use depends on whether your spreadsheet contains bar graphs with patterned fill lines.

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If a user has both Acrobat and Microsoft Excel installed on their workstation, it is possible to create a PDF file directly from an Excel spreadsheet. To convert an existing spreadsheet to PDF format, follow the procedure below:

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2. Click the **View** menu and select **Page Break Preview**. You will see a scrollable view of your spreadsheet with **blue lines** where page breaks will occur. You may drag the blue lines to make page breaks occur in more meaningful places. Caution: do not try to make the pages longer than a standard printer can handle. When you are done adjusting page breaks, continue with the next step.
3. Click the **File** menu and select **Print...**

4. You must now make a choice. Using the drop-down box for the **Printer Name**, you will select either **Acrobat PDFWriter** or **Acrobat Distiller**. Here is the rule for making your choice:

   ❍ If your spreadsheet includes **column or bar graphs with patterned fill lines**, you should select **Acrobat Distiller**. Do so and continue on this page for your instructions. (An example of patterned fill lines is shown below.)
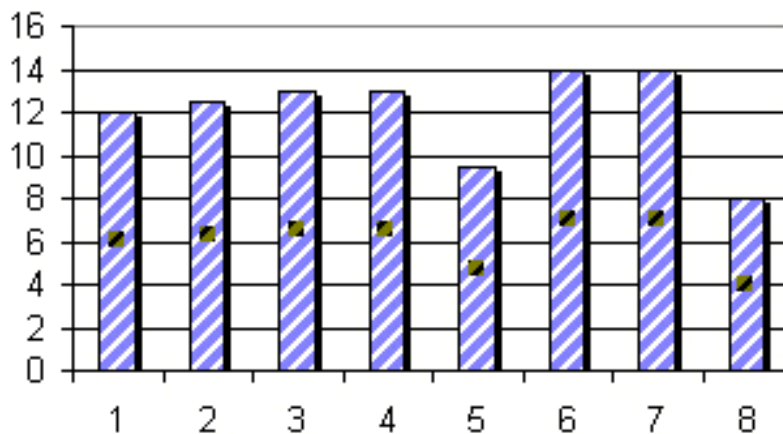
   ❍ If your spreadsheet does **not** include **column or bar graphs with patterned fill lines**, you should select **Acrobat PDFWriter**. Do so and follow this link.

5. Click the **Properties** button;

6. If you chose Acrobat PDFWriter in Step 4, you are on the wrong page.
   The right page is here.
   If you chose Acrobat Distiller, continue:

   Distiller Instructions:
   If you chose to print to Acrobat Distiller, you will see the **Acrobat Distiller Document Properties** window. Make sure you are on the **Advanced** tab, as shown below:

Acrobat Distiller Document Properties

| Page Setup | Advanced |

AdobePS Acrobat Distiller Document Settings
- Paper/Output
  - Paper Size: <Letter>
  - Orientation: <Portrait>
  - Paper Source: <Automatically Select>
  - Copy Count: <1 Copy>
- Graphic
  - Resolution: <72dpi>
  - Color Appearance: <Color>
  - Scaling: <100 %>
  - TrueType Font: <Substitute with Device Font>

Change 'Resolution' Setting

- 72dpi
- 144dpi
- 300dpi
- 600dpi
- 1200dpi

[OK] [Cancel]

---
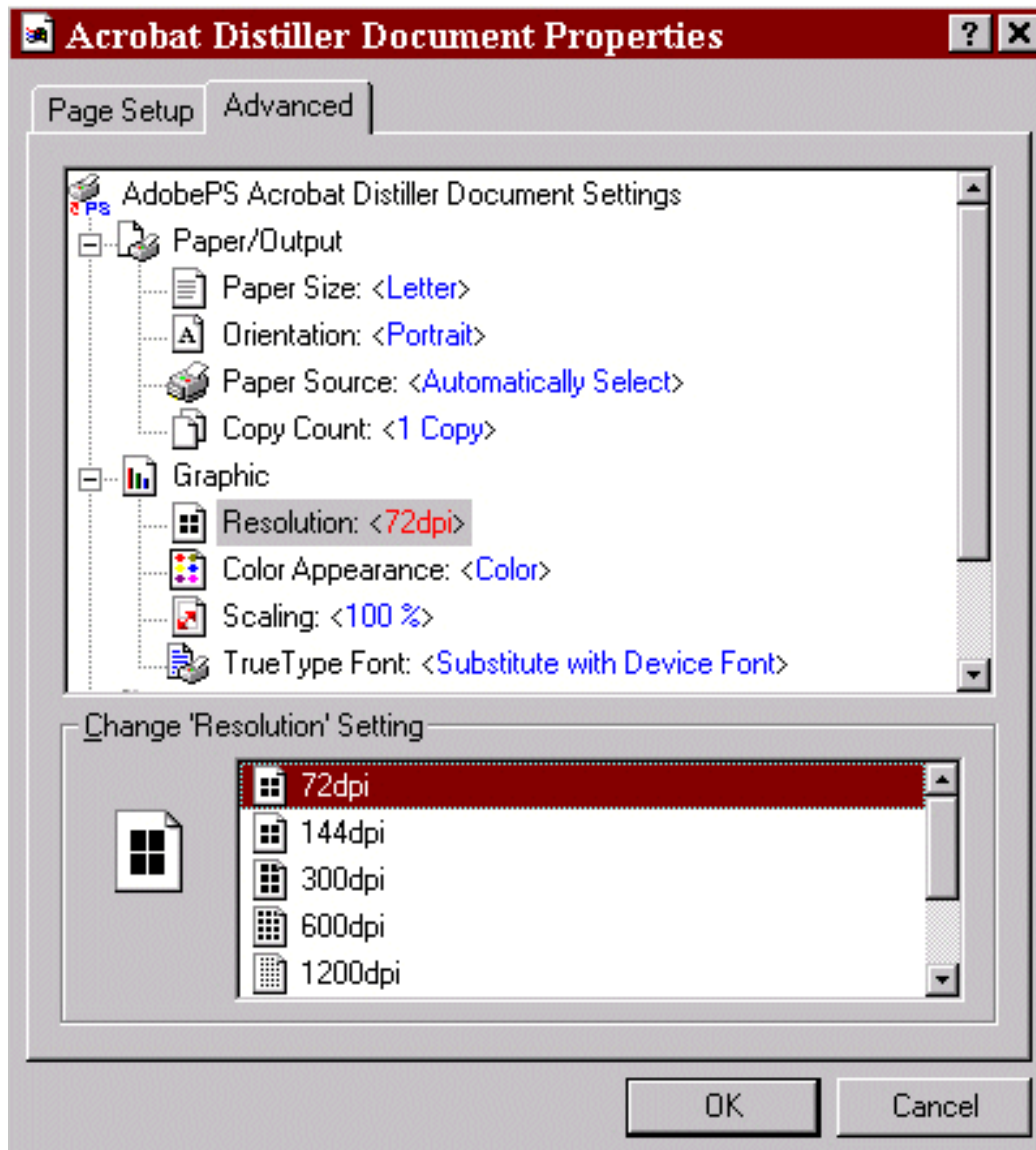
a. Click the line for **Resolution**, as shown above.
b. Change the resolution to **72dpi**, if it is not set already.
c. Click **OK**, to close the Acrobat Distiller Document Properties window.
d. Continue with Step 7.

> Note: At this point, Excel offers a Preview button in the Print window. It may be useful to click it, then click the Margins tab on the next screen. From here you can drag your margins to adjust spacing. This option is not available in Word.
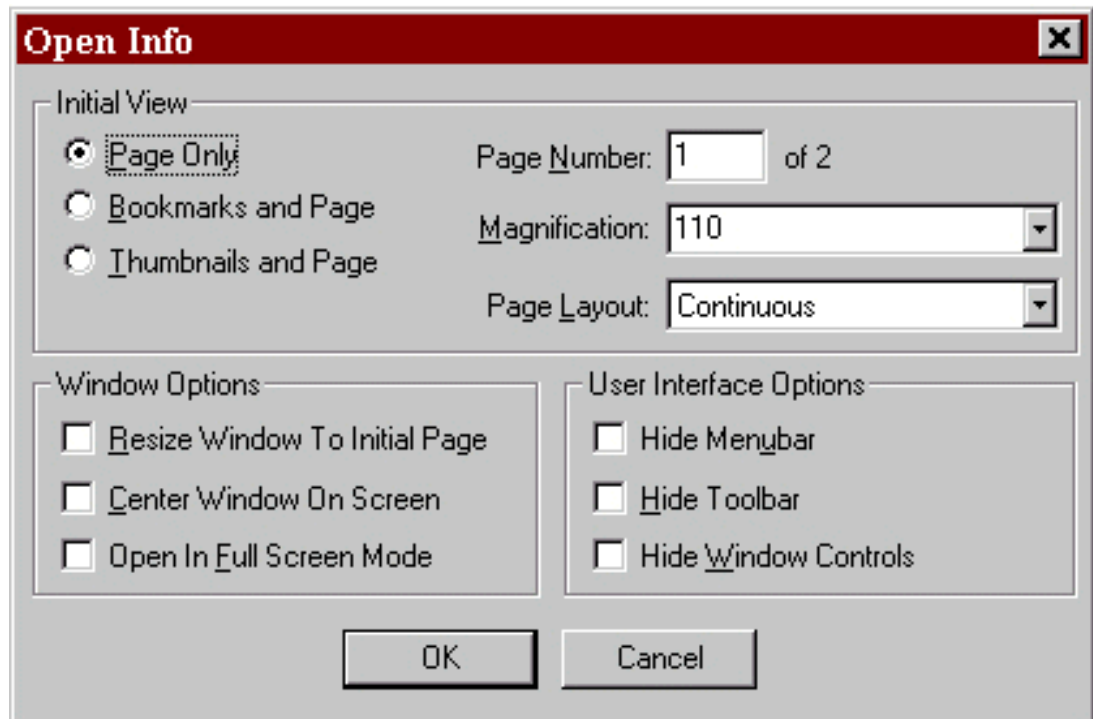
7. Click **OK** to close the Print window.
8. If you are printing to **Acrobat Distiller**, your file will automatically save in the following directory:
C:\Program Files\Adobe\Acrobat 4.0\Pdf Output. You will need to run

Adobe Acrobat and **open the file** manually before continuing with the next step.

9. In Acrobat:
    a. Open the **File** menu, and select **Document Info | Open**;

   (This takes you to settings that affect how the document will be displayed when it opens for the user in Acrobat Reader.)

   Open Info

   Initial View
   - ⦿ Page Only
   - ○ Bookmarks and Page
   - ○ Thumbnails and Page

   Page Number: 1 of 2
   Magnification: 110
   Page Layout: Continuous

   Window Options
   - ☐ Resize Window To Initial Page
   - ☐ Center Window On Screen
   - ☐ Open In Full Screen Mode

   User Interface Options
   - ☐ Hide Menubar
   - ☐ Hide Toolbar
   - ☐ Hide Window Controls

   [OK]   [Cancel]

    b. If the document is to be displayed in **Portrait** orientation, set the **Magnification to 110**; if the document is to be displayed in **Landscape** orientation, set the **Magnification to 100**
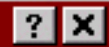
   Note: 110 is **not** an option in the drop down settings. You will have to **type 110** in the Magnification box.

    c. Set the **Page Layout** to **Continuous**
    d. Click **OK** to close the Open Info window
    e. Use **File | Save As...** to save the file again. Make sure that the **Optimize** option is checked before clicking the Save button.

Save As

Save in: Winword

- Dreamweaver.pdf
- ITPAJRNY.pdf
- ITT_classes.pdf

File name: ITT_classes.pdf

Save as type: Acrobat (*.pdf)

Save

Cancel

Security

None

Settings...

☑ Optimize